

Client Interview | Altura Benefits

Client Quick Facts:



Altura Benefits:
www.alturabenefits.com



Specializes In:

- Group & Individual Health
- Ancillary Products
- Medicare
- Life & Retirement Planning



Previously using:
Vertafore, Microsoft Dynamics CRM

Note: AB denotes AgencyBloc and AL denotes Amy Lifferth, Individual Plans Specialist for Altura Benefits

About The Company

AB: Where are you located?

AL: Salt Lake City, UT

AB: When did Altura Benefits start?

AL: Craig started Altura Benefits in 2005 after creating and growing his employee benefits, insurance, and financial services career for 10 years.

AB: Who do you serve?

AL: We are a full-service agency providing a variety of services including group and individual life and health, ancillary benefits, Medicare, and retirement planning.

The Problem

AB: Why were you seeking out a CRM?

AL: We weren't completely happy with our existing solution, and it didn't fit the needs of our agency.

AB: Did you use a CRM before AgencyBloc?

AL: For 9 years we used Microsoft Dynamics CRM, but we felt that it didn't fit our specific needs and it was too difficult to customize, so we switched to Vertafore for one year. Originally, we were drawn to Vertafore because of its robust capabilities, but we soon learned that they were too generic and it was a very challenging system to navigate. There were so many options within the system, but the ones we needed didn't work in the ways we needed.



Switching to AgencyBloc

AB: What drew you to AgencyBloc?

AL: We saw the demo of AgencyBloc and loved the design. It seemed to have all the features we were looking for in a system. Plus, they assured us that all of our data would remain 100% ours, and we could easily export it out if we ever chose to leave. We also liked how easy the system was to use.

AB: What were some of the biggest challenges your agency faced during the data migration process?

AL: One of the biggest challenges we faced was exporting our data out of Vertafore's software. We were disappointed to learn that they were unwilling to let us export our data. It was such a challenge that we were never able to export all of our data successfully. In fact, we had to pull Vertafore's software up on our computer and manually write the information down for some of the data points we couldn't export.

Another challenge we faced was the state of our data. The data we were able to export from Vertafore's system was in poor condition. Since we had to enter information into a variety of open fields within the system, our data formats were not consistent. I had to spend many hours working to clean up our data and put it into a consistent format that followed the same rules throughout. In many cases, we just updated our original files from Microsoft Dynamics CRM, since they were only a year old, and used them instead.

The last challenge we faced was customer support. Vertafore's support works on a ticket-based system, which means you call in, a ticket is created, someone works on your problem, and then they call you back. We spent a lot of time waiting for calls and eventually got into the habit of not calling to get our problems fixed.

"I wish we would have switched to AgencyBloc sooner because the system is such a good match for our agency. It does exactly what we hoped it would do, and I wish we'd have found it earlier."

AB: How long did the entire process take?

AL: To get up and running at almost full capacity took roughly 2 months. However, **60% of that was spent** with me cleaning and preparing our data we exported from Vertafore. I wanted to have our data in the best shape possible to make import easier and help us get going quicker. The other **40% of the time** I used to learn and explore AgencyBloc's system so that I could better understand the software, and then also upload all of our data into it.

After Switching to AgencyBloc

AB: How long have you been using AgencyBloc?

AL: About 8 months.

AB: How does your company run differently vs. how it ran before AgencyBloc?

AL: We never really got all of our data into Vertafore, and never fully used their system. With AgencyBloc, we have everything in the system and we constantly use our data there, because it is so user-friendly. We are looking forward to taking even better advantage of AgencyBloc's full marketing potential in the future. It took us a while to get the commissions component going, but now it's easy, and AgencyBloc's software does all the work calculating and processing the splits.

AB: Was it worth the effort you went through with the data migration?

AL: Yes. We're very glad we switched. AgencyBloc is easy to use, and it can do everything we need it to do. With AgencyBloc, we utilize our data much better than before and can track all of our information, run reports, and monitor our agency's growth and health.